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ABSTRACT

This portfolio project reports on an effort to help Utah school districts prepare students for a smooth and successful transition out of high school and into post-secondary education or the workplace. Through the project, three important school processes were identified: (1) career guidance; (2) long-term planning and goal-setting; and (3) maintenance of related student work in a portfolio system. Based on information collected through the project, a model was developed and disseminated as an information resource to Utah educators. Components of this model include training students to make decisions and set goals for academic success from elementary school to high school through Student Educational Planning and Student Educational and Occupational Planning processes, continuous advisement, coursework, and recording progress throughout the school years in a working portfolio as well as culminating achievements in an exit portfolio. The model also includes suggestions for designing the system at a district or cluster level. Includes reports on each school visited. Through these site visits the operation of nearly every component included in the model was observed. For each component, recommended procedures for implementation are included. (MKA)

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UTAH PORTFOLIOS

A DEVELOPMENTAL

STATE MODEL FOR

PORTFOLIOS:

Combining Student

Planning And

Documentation of

Accomplishments

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**A DEVELOPMENTAL STATE MODEL
FOR PORTFOLIOS:
Combining Student Planning
and Documentation of Accomplishments**

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INTRODUCTION

This SEOP/portfolio project represents an effort to help Utah school districts prepare students for a smooth and successful transition out of high school and into post-secondary education or the workplace. The project began as an investigation of the use of proficiency-based credit assessments (used to capitalize on students' out-of-school learning, reduce student-teacher ratios in classrooms, and provide more educational flexibility). The investigation revealed that public schools in Utah and throughout the nation used proficiency-based credit sparingly. Consequently, the project evolved to explore other public school processes that integrated students' in-school and out-of-school educational experiences. Through the project, three important school processes were identified: 1) career guidance, 2) long-term planning and goal-setting (through Student Educational and Occupational Planning), and 3) maintenance of related student work in a portfolio system. These processes, used to extend student learning beyond traditional school boundaries and ease the transition into postsecondary life, compile information about students' development, interests, and abilities as they progress through school and graduate. Presumably, each process feeds into graduation requirements, demonstrates student achievements, and equips students with the tools needed to manage their personal development after graduation.

Through the project, information has been gathered from a) a literature review, b) interviews with educators across the state, and c) a working group of Utah State Office of Education personnel and other consultants. The literature review indicated that career guidance, planning processes, and portfolio development help students move smoothly out of high school and into postsecondary activities. Interviews were then conducted with on-site educators to discover how these processes have been implemented in Utah schools. Interviews were conducted at ten schools throughout the state during the 1993-94 school year (see Appendix A); the schools were selected based on information, primarily available through Centennial Schools applications, indicating that the school had implemented at least one of the aforementioned processes. Many other highly effective schools could have been included in this process but were not due to constraints on time and resources.

Based on information collected through the project, a model for the development of a system for preparing students to make a smooth and successful transition through public school and beyond has been developed and will be disseminated as an information resource to Utah educators. The model facilitates development of a system that makes educational planning, goal-setting, and career preparation part of a child's education from the time s/he enters school. Therefore, students begin in elementary school to plan their education and be responsible for achieving their educational goals. The model is designed to include *all students* and provide a broad range of career exploration activities to meet all students' needs and interests. Teachers/counselors/ parents/students use the educational planning and goal setting done at the elementary level to prepare students for further planning and more responsibility. In junior high and in high school, students take primary responsibility for finishing their high school education and being prepared to move on to something productive afterward.

Components of this model include training students to make decisions and set goals for academic progress from elementary school to high school through the **Student Educational Planning/Student Educational and Occupational Planning processes (SEP/SEOP)**; continuous **advisement**; **coursework**; and recording progress throughout the school years in a **working portfolio** as well as culminating achievements in an **exit portfolio**. The model also includes **suggestions for designing the system** at a district or cluster level (including elementary, junior high, and high schools) so that it is coordinated between teachers and within and between schools to provide the desired continuity and spiraling for students. Through the site visits, the operation of nearly every component included in the model has been observed in Utah schools, although no site visited had all components operational. For each component, recommended procedures for implementing the component itself and its coordination with the other components in the model are included.

STUDENT EDUCATIONAL PLANNING PROCESS/ STUDENT EDUCATIONAL AND OCCUPATIONAL PLANNING PROCESS

Student Educational Planning/Student Educational and Occupational Planning (SEP/SEOP) occurs in student-advisor conferences held twice a year. In these conferences, students design a plan outlining how their education will unfold for the next several years. The SEOP conferences have typically taken between ten and thirty minutes and relied on predominantly routine processes for completing planning forms. Serious educators must ask, "How can students create a meaningful four or five year educational plan in two thirty minute annual conferences?" Clearly, high-powered computer programs and other useful tools allow students to review masses of information very quickly (with certain computer programs, they need only input a list of variables and in seconds, they have an educational plan). However, these programs alone do not allow students to thoughtfully consider all of the variables influencing their decisions. No technology, however powerful, can churn out a plan that has long-term meaning to a student unless that student has multiple opportunities to consider the implications of that plan and its alternatives. In other words, computer generated plans in isolation mean nothing. Students need processes that continually prepare them for their SEP/SEOP conference; they need to review their previous goals and plans prior to the conference; they need to have time to think through the important decisions that they will make; and if these decisions are not monumental, why waste time making them?

An individual SEP/SEOP conference should be preceded by a group advisement component wherein students are explicitly prepared to CONDUCT their upcoming SEP/SEOP conference. It is also helpful if the teacher/counselor/advisor who navigates the student through the SEP/SEOP has mastered any technology that may be used in the conference and can answer any questions that might be raised. The student must lead the conference with the advisor as a reference guide. A meaningful SEOP conference utilizes advisement procedures and career or life-planning courses to prepare students; it refers explicitly to the knowledge and skills that students have been cultivating in these other processes.

Students would benefit from feedback on their performance in the SEP/SEOP conference itself. In a formative SEP/SEOP conference that prepares students for the future, an advisor might use a set list of performance measures to determine how each student managed his/her conference and how the conference might be more meaningful next time. For instance, some students may display a lack of familiarity with computer programs used; in another instance, an advisor may note that a student has poor communication skills in one-on-one situations. Based on these observations, the advisors can take steps to help the student improve these skills which are vital for their educational development, and ultimately for post-educational activities such as job interviewing. In the SEP/SEOP conference, processes and products are equally important.

Continuity between SEP/SEOP conferences helps students achieve the desired goals in less time; if major changes in SEP/SEOP processes occur each year, time will be wasted as students struggle to understand what is expected of them. The only major shifts in

SEP/SEOP format may occur at the transitional points between school levels. The following components are effective SEP/SEOP activities at *every* grade level:

1. Student, parent(s), and teacher/advisor/counselor are involved in the conference.
2. Setting goals, making plans to attain goals, and reviewing progress toward goals provide the focus.
3. Student conferences or sessions take place at critical points throughout the year (e.g., quarterly, at each trimester or each semester--see advisement section in this document).
4. Although the focus is on setting and attaining goals, each session must recognize *positive* aspects of student performance and acknowledge the validity of students' goals and efforts.
5. Individual sessions must be on individual students; group SEOP sessions are organized around common interests or needs of participating students.
6. Sessions enlarge students' understanding of school by *not* focusing exclusively on one area of interest: hobbies, friends, family, class, teachers, etc. are all areas that students may discuss relative to their SEP/SEOP.
7. Follow-up on the SEP/SEOP occurs in advisement and in academic classes; teachers are familiar with the SEP/SEOP process and products and use them as part of instruction and class activities.

At different grade levels, the school personnel involved and the emphases of the sessions will change. Below, more specific characteristics of the sessions are presented for elementary schools, junior high and middle schools, and high schools.

ELEMENTARY SCHOOLS

1. *Teachers* attend the sessions along with parents and students.
2. Students keep copies of SEP materials at their desks and teachers use the SEP products in various learning activities throughout the year.
3. Teachers discuss students' academic and behavioral performances with students and parents; report cards, in any form, are presented in this context rather than sent home.

JUNIOR HIGH AND MIDDLE SCHOOLS

1. *Counselors* or teachers (as assigned advisors) that have received training in the SEOP processes, attend the conferences along with parents and students.
2. Counselors initiate career exploration activities (in conjunction with a careers course and/or advisement component); any career goals, job fairs, "shadowing" experiences, etc. are documented.
3. Students use career exploration technology (e.g., CHOICES Jr., SDS, interest inventories, aptitude tests, etc.) and/or discuss the results--it would be more beneficial if the technology were used in advisement groups and the results were thoroughly discussed in the conference.

4. Students design their school schedules for the next two or three years and identify extracurricular activities that build on their interests. Students begin planning their transition into high school.
5. Counselors present and discuss students' grades (as well as achievement test scores and/or Core Assessment results if appropriate) to students and parents.

HIGH SCHOOLS

1. *Advisors* (teachers trained in the SEOP processes, resources, and technology) or counselors attend the conference along with parents and students. See the section on advisement for appropriate means for assigning advisors.
2. Students begin elaborating on career-oriented plans (including postsecondary education aspirations) using CHOICES, PLAN, CPP, aptitude tests, etc.
3. Students document their work and volunteer experiences; they also plan future experiences to feed into a resume format.
4. Students create long-term educational and/or occupational plans (four or five year plans). Plans specify high school classes to be taken, activities to pursue, training programs, college entrance exams, as well as postsecondary activities including further education, jobs, etc. Plans extend four or five years beyond the conference; they are not four year plans if they are retroactive.
5. Students document the steps they have taken to reach goals (e.g., began a job, received a scholarship application, registered for concurrent enrollment class).
6. Advisors present and discuss grades, achievement test data, and extra-curricular activities that are relevant to students' goals and long-term plans.

ADVISEMENT

Advisement provides continuity to the entire comprehensive student education and occupational planning process. It is the means by which students, teachers, and parents maintain an organized understanding of where the student is and what needs to be done to help the student move forward and accomplish his/her goals and plans. Advisement should be set up in such a way that students are the primary decision makers about their future. They should have access to their working portfolios at all times, and as they are ready, they should be responsible for initiating and perpetuating each phase of the process. The advisor (teacher/counselor) serves as a facilitator and mentor in helping students carry this out. Parents should have ready access to any information they desire about their student's plans and should have opportunity for contact with the student's advisor, but will not necessarily be included in the advisement sessions.

Advisement differs from coursework in that it does not involve structured instruction in a large group setting but provides for informal as well as formal interaction with students, preferably on an "as needed" basis. Advisement differs from the SEP/SEOP conferences in that it occurs frequently throughout the school year rather than once a year and generally involves only the student and advisor. It is also more informal in nature than the SEP/SEOP process.

Advisement should:

- be continuous throughout the school years.
- to the extent possible, be coordinated--that is, there should be written and/or oral communication between advisors of a student as that student progresses through school.
- provide for *timely* follow-up on goals to ensure that student's goals are still appropriate and that the student is making adequate progress toward their attainment.
- include a regular review of the student's progress toward attainment of competencies and their ties to the student's coursework.
- provide reinforcement and follow-up to what the student is learning in career guidance coursework.
- facilitate decision making on the part of the student.

The choice of individuals to serve as advisors also needs to be determined within the context of the school. In any case, teachers/counselors should not be *required* to serve as advisors--they should be allowed to choose whether they will serve in that capacity. In addition, some individuals who are willing to be advisors may need training to be able to offer all of the help needed. At the secondary level, when assigning advisors or allowing students to choose an advisor, students and teachers should consider the possibility of their advisor serving as chair of their project committee as well (see Exit Portfolio section in this document). If this is to be the case, careful consideration should be given to the expertise of the advisor in the student's primary area(s) of interest. If possible, the advisor should be a faculty member whose specialty is in that primary area of interest.

Advisors should be able to:

- discuss how students' coursework relates to outcomes that are delineated in the working portfolio, thus acting as an academic coordinator for students and teachers.
- facilitate interpretation of results from standardized assessment instruments (e.g., achievement tests, Core Assessment, college placement tests, aptitude and interest surveys) and feedback on what the results might mean for the individual student.
- help students adjust schedules and make scheduling decisions.
- help students apply what they have learned in their career guidance coursework and facilitate the decision-making process.
- provide information on scholarships, financial assistance, and postsecondary educational opportunities.
- act as the student's project advisor/committee chair (or help the student choose an appropriate faculty member to serve in that capacity).

SCHEDULING POSSIBILITIES:

In order to implement the process of advisement as outlined here, schools will need to find ways to incorporate the process into the school schedule. Schedules could be adjusted in a number of different ways to accomplish advisement purposes. It will be up to the school/district to determine the nature of advisement sessions and their frequency. The following are some possible ways in which advisement might be structured:

- Once a week class (all or a portion of a regular period).
- Faculty office hours designated for students to come individually, either on their own or by invitation.
- Biweekly class--possibly divide students into groups that rotate between meeting with the teacher and being assigned some other activity.
- Regular (e.g. once a week or biweekly) advisement period used to provide job fairs, shadowing, on-the-job experience, community (school) service, etc. Students attend if interested, or attend class with advisor.

If possible, each student should meet with his/her advisor at least 6 times a year *in addition to the SEP/SEOP conference*. (NOTE: Six times a year, however, may not be enough to facilitate the link between life role outcomes and classes, etc. as described in the exit portfolio section of this document.)

GUIDANCE CURRICULUM

In order to initiate and deepen career guidance and planning processes, schools should provide students with a well-structured course or series of courses that enable them to make well-informed educational and occupational decisions. Such courses are often referred to as Careers Courses, Life Planning, or Skills for Success. The courses have two essential aims: 1) to provide students with the tools and information they need to take charge of their own lives and 2) to prepare students to take advantage of extracurricular and out-of-school opportunities to develop themselves while in school. In order to enable students to take charge of their lives, the courses should attempt to enhance students' competencies in the following areas:

1. ***Assess Self***

- a) rigorously evaluate themselves (by using a variety of data and reinforcing self-esteem)
- b) evaluate their personal options for the future based on career information
- c) plan effectively and set goals
- d) thoughtfully analyze a variety of information in developing decision making, goal-setting, problem-solving, and planning skills

2. ***Identify Opportunities***

- a) identify general workplace skills
- b) know linkages between education and employment
- c) assess, interpret, and evaluate information about jobs, careers, and educational opportunities

3. ***Capitalize on Opportunities***

- a) seek, recognize, and seize opportunities for success
- b) think creatively and pursue new experiences related to personal interests
- c) work together responsibly within groups and systems

This coursework is *not* designed to stand alone. It is designed to help students interpret the competencies, skills, and knowledge that they are developing through their other classes and activities (including out-of-school activities). The coursework provides students the opportunity to envision how they can apply the skills they are learning; they analyze what they are doing now in light of the workplace.

Since the coursework does not stand alone but merely helps students apply what they are learning in other classes, different schools will want to elaborate and focus on certain of the aforementioned objectives while ignoring others. These decisions will depend on such issues as grade level, socio-economic status of the student body, the school's organizational culture, and the structure of the school day. Whatever goals a school decides to focus on, success of the coursework depends on formulating overall goals and specific objectives. These goals then become a list of criteria for assessing the

effectiveness of the course. Without such a list, teachers, students, and administrators would be unable to discern whether or not their time, efforts, and money are being put to good use.

WELL-DEFINED CURRICULUM

From the list of overall goals outlined above (which focus on student competencies rather than educational inputs) or any similar list, a specific curriculum can be designed. The curriculum must describe some scope and sequence detailing how goals will be achieved. A specific (but not overly constricting) curriculum is important; it provides a guide for assessing the successful implementation of a course. The predetermined curriculum can be matched against what actually occurred during the course and the teacher (or a committee of educators) can then make revisions to the curriculum based on experience. A skeletal example of a scope and sequence follows. Each of the major curricular components below (e.g., Self-Awareness) is followed by a series of activities.

- I. Self-Awareness
 - use interest inventories, aptitude tests, achievement data, self-evaluation
 - provide instruction in enhancing self-esteem
- II. Study Skills/Individual Learning Skills
 - explore learning styles and strategies
 - assess personal performance
 - plan and direct educational activities
- III. Career Awareness/Exploration
 - use career choices computer programs
 - explore job clusters
 - attend job fairs, internships, shadowing
- IV. Job-Related Behaviors
 - write resumes, practice interviewing
 - handle interpersonal relationships/teamwork
- V. Introduction to Postsecondary Opportunities
 - explore educational/training opportunities
 - apply for financial assistance and scholarships
 - initiate on-the-job training, apprenticeships, etc.

Major steps in developing coursework include:

- Identify course goals.
- Coordinate those goals with school goals, advisement, SEP/SEOP planning, and other academic classes.
- Create a well-defined curriculum referenced to course goals.
- Develop a list of criteria for assessing successful implementation of the course.
- Link the course to other on-going activities so that they will reinforce what is taught.

- Plan to orient students to the educational resources and opportunities available to them.
- Coordinate coursework with courses at the other relevant school levels.
- Assess student performance in the planning and career preparation areas and provide feedback.

PROMOTING CONTINUITY

These curricular components introduce students to the postsecondary world and enable them to begin planning their transition into that world; however, a single course cannot sufficiently ingrain in students the skills and abilities they will need. In order for students to successfully plan and coordinate their postsecondary activities, they need to: a) continually revise any postsecondary plans that they make in these courses, b) re-evaluate themselves, and c) enrich their planning and goal-setting skills. Therefore, the careers/life-planning courses must not only equip students with new skills and knowledge, they must teach students how to optimize the benefits from other programs offered in school (e.g., SEP/SEOP conferences¹, advisement processes, academic classes, portfolio development, and extracurricular activities). In this sense, the courses must function as a rigorous orientation to the education system. Courses will achieve the most desirable results when they occur (are required) at the on-set of each educational transition (e.g., elementary school to junior high/middle school, junior high/middle school to high school); otherwise, students will lose opportunities to fully utilize the resources available to them.

COMMUNICATION

The courses, which orient students to current and future educational opportunities, could best facilitate the transitions at the seventh grade (transition into junior high), ninth grade (transition into high school), and twelfth grade (transition out of high school). At the elementary level, similar instruction can help students understand their progress from one grade to another. To reinforce past learning and avoid needless repetition, continual communication between curriculum designers and/or teachers at the different school levels needs to be established. Communication may occur in many ways: a) formal meetings between curriculum developers and/or teachers at the different levels, b) maintaining folders or portfolios that document activities and passing the folders along with students as they transition into higher grade levels, c) "cone"/cluster meetings or district meetings which coordinate curriculum for a more widespread locality. Through such communication, the courses can increasingly extend students' conceptions of school and how it relates to the world of work and postsecondary education.

¹ For instance, Granger High School and Brighton High School initiated an expanded SEOP conference through the culminating activities of their careers courses. By linking the SEOP conference and the careers course, schools emphasize the importance of the skills learned in these procedures and help students to follow-up on themselves.

ASSESSMENT

The knowledge and skills conveyed in careers courses will benefit students throughout their lives. Students learn the value of these courses by receiving meaningful assessments of their achievement or competency in the areas covered by the courses. Too often students receive pass/fail credit for careers courses by merely completing all assignments; they rarely receive systematic and specific feedback about their performance in the different curricular components covered through the course. Schools can convey the importance of the skills taught in these courses by allocating appropriate credit to the classes, mandating that grades be assigned, and/or assuring that the skills taught in these courses are formally re-addressed in other mandatory courses (e.g., English).

TRANSITIONS

Usually, the most critical transitions for students occur at the sixth or seventh, ninth, and twelfth grade levels. Coursework may be planned to coincide with these transition points to facilitate the transitions and reinforce the content and concepts being taught.

Sixth or Seventh Grade

In the sixth or seventh grade, students are flung into a relatively fragmented, impersonal schooling environment. Students may know nothing of the widely different schedules, the more expansive resources, and the plethora of extracurricular activities available to them; they need a compelling and prolonged orientation to enable them to take responsibility for their new opportunities. A week long orientation at the onset of the sixth or seventh grade only leaves students stunned. At minimum, an adequate orientation will support students systematically through the first grading period of junior high/middle school (helping students to understand diverse grades for the first time). An extended course helps students make sense of and coordinate the apparently scattered structure of junior high/middle school. While sixth or seventh graders need school orientation, they also need to begin learning about self-evaluation, careers, and college; they need to learn how to use various resources and technologies to help them in these endeavors.

Ninth Grade

The ninth grade course provides students with more extensive, career-oriented information. In the class, multiple opportunities for students to visit their expected high schools (in the case of three year high schools) and to utilize the resources available at those schools must be extended. Currently, most schools offer their high school careers course in the tenth grade (opposite drivers' education); consequently, many students do not receive the preparation until the end of their sophomore year (or in some extreme cases until their junior year). A more timely orientation to high school processes would occur in the ninth grade; otherwise many students may miss out on valuable educational opportunities due to ignorance. Some schools provide these courses as independently scheduled classes while others offer them as smaller components within required classes (e.g., geography). Each school has different needs and will find that different scheduling options work better

than others; but offering a careers course as a component of another class diminishes the importance attached to that class and minimizes the assessment implications of the class.

Twelfth Grade

Although a twelfth (or eleventh) grade course may not be suitable in most instances, the possibility must be mentioned. The transition out of high school is one of the most dramatic and deterministic transitions that students face. Significant procedures must be carried out with graduating seniors to assure that they have initiated a smooth transition out of high school. (See the section on Exit Portfolios for more information on this topic.)

WORKING PORTFOLIO

Portfolios are a unique means of collecting evidence of student performance. They are generally collaborative in nature. Teachers and students, and in some cases parents and administrators, decide what will be included and how it will be evaluated. Portfolios can include a wide variety of materials produced in a number of different media (e.g., paper/pencil, visual art, video, posters), and can include both standard and individualized materials. This flexibility makes the portfolio an ideal means of assessing ongoing as well as exit performance in a highly individualized fashion.

As students progress through school, they need to gradually assume more responsibility for orchestrating their personal accomplishments. A working portfolio provides students with a mechanism for coordinating this progress. It also provides teachers, counselors, and administrators with an organizational tool for communicating with each other about individual students. Hence, the working portfolio bolsters student and school responsibility.

The working portfolio contains all educational products that may significantly influence a student's decisions for the future. This includes SEP/SEOP documents, relevant assessments from teachers and standardized tests, records of personal goals and ambitions, documentation of significant achievements and experiences, samples or descriptions of exemplary work completed, etc. A well-organized working portfolio that includes a personal history will lend continuity to student decisions and help students communicate their perspectives and needs to advisors.

The working portfolio will benefit students most if it is used in a variety of ways to coordinate educational approaches for students. Some suggestions for using working portfolios follow.

STUDENT CONTROLLED

Students are accountable for maintaining their portfolios. This liberates the portfolio from its archival status. To bolster student accountability, SEP/SEOP processes will be built around the working portfolio. Students with portfolios in disarray will suffer from parental discontent and negative assessments of their organizational skills (if SEP/SEOP skills are assessed and documented--see SEP/SEOP section of this document).

Although students keep the working portfolios, the school does not abdicate all responsibility for maintaining portfolio use and quality. Students keep their working portfolios so that they may be used in many different classes as well as for counseling activities. Also, students keep their portfolios to give them the sense that the working portfolio is authentically theirs; they ultimately decide how it will be used. This teaches students the importance of organizing personal documents (e.g., resumes in the future).

SCHOOL COORDINATION

As previously mentioned, schools reinforce student accountability through portfolio use. Schools also use working portfolios to coordinate across grade levels and across subject

areas. An outcomes or competency checklist may be an important coordinating tool (see sample checklist in Appendix B), particularly as the student begins work on the exit portfolio (see Exit Portfolio Section of this document). SEP/SEOP advisors and teachers can refer students to this checklist; they can help students visualize their education as a "holistic" process working for students. Teachers/advisors should help students identify personal needs that can be met in different classes. For example, if a student lacks planning skills as identified on the checklist, a teacher or advisor can coach that student to use an English project as a means for developing and demonstrating those skills.

Using a working portfolio to coordinate student learning requires highly personalized attention described in the advisement section of this document. Department and grade level teams may also use the organization of working portfolios to influence their goals. They could design activities according to the potential personal needs that students may have. Counselors may also coordinate team goals across the school to assure that no overload occurs in a particular area.

PREPARATION FOR EXIT PORTFOLIO, RESUME WRITING, AND JOB INTERVIEWING

The working portfolio compiles evidence (e.g., work history, grades, test scores, certificates, competencies attained) that may be useful in the exit portfolio, writing resumes, and job interviewing. Working portfolios prepare students to analyze, explain, and sell themselves convincingly.

A well maintained working portfolio should:

- teach students to be accountable.
- assess student skills independent of coursework.
- coordinate student's personal development.
- coordinate student's activities across grade levels and departments.
- systematically compile evidence of competency and achievement.

EXIT PORTFOLIO

The High School Exit Portfolio in conjunction with this project is a formal collection of specific materials that document the student's performance in school and demonstrate that s/he has completed all requirements for graduation. Its purpose is to 1) provide evidence of completion of standard requirements for graduation from high school and 2) demonstrate the level of excellence attained by the student in his/her specific area(s) of interest (as demonstrated by extensive, indepth projects in one or two areas of particular interest). This portfolio may serve as *part* of the evidence for completion of requirements for graduation from high school. Information in the portfolio may also be useful to the student in applying for postsecondary education, jobs, etc.

COMPONENTS OF THE PORTFOLIO

The exit portfolio has three basic sections: 1) an organizer or "**resume**" that would provide some basic information about the student and help the reader understand the information contained in the portfolio, 2) documents or other evidence that demonstrate completion of **standard requirements for graduation**, and 3) a report(s) on the completion of individual projects.

Resume

The resume should include some demographic information about the student such as name, address, date of completion of the portfolio, age, and any other needed information. Following the demographic information, the school should design a way of detailing what is in the portfolio such as a table of contents, a graphic display of the contents, or some other creative way of guiding the reader to understand the portfolio contents. (See samples in Appendix C.)

Standard Requirements for Graduation

This section of the portfolio should display the information specific to the district/school that indicates that the student has completed all of the work required for graduation from high school. If the district offers differing diplomas depending on the student's choice of specialization or expected level of performance (e.g., graduation with honors, graduation in a specific academy, graduation with a specific "seal") this section of the portfolio should give evidence of the student having met those specialized requirements.

The following should be included in all portfolios:

- Transcripts--this could be a simple listing of classes and grades, or courses could be reported collectively under subject headings with a cumulative GPA. An overall GPA should be included.
- Test scores and score reports--include any scores that are relevant to the student's performance in school (e.g., Stanford Achievement Test, college entrance exams, aptitude tests, interest inventories).

- SEOP information (documentation of student interest development, career focus, etc.)

Other optional materials might include:

- Autobiographical essay--if an autobiographical essay or some compilation of autobiographical material is completed as part of a class or the SEOP process, it may be appropriate to include it as part of the portfolio.
- Work experience, references, letters of recommendation.
- Non-school activities connected to the student's primary interests and career choice(s)--e.g., additional training or expertise in art, music, athletics, computers; scouting; church/community service; hobbies; summer camps or classes.
- Awards, medals, certificates, recognitions connected to the student's primary interests and career choice(s). (NOTE: do not include actual award, medal, etc. but cite them with a *brief* description of what they are for and how they relate to the student's primary interests or career choice).
- Other specialized materials specific to a level or type of graduation (e.g., graduation with honors or graduation from a specific academy).

Projects

Individual excellence is demonstrated through the completion of a long-term project in *each of two* primary areas of interest to be completed by the end of the senior year. This activity will provide students the opportunity to demonstrate their highest quality work in their primary areas of interest.

Work on the projects begins in the sophomore year. Using information from the SEP/SEOP process and career planning that have taken place during grade school and junior high school, and with the help of their advisor, students identify *two* areas of primary interest in which they already have some expertise and/or which are related to their chosen career path. (NOTE: schools may choose to require that one of the two be an "academic" area--e.g. math, science, writing, social studies). *Selection of project areas must be completed by the end of the first grading period (quarter, semester) of the sophomore year.*

Once the project areas have been determined the student and his/her advisor explore possible ways in which the student could demonstrate the highest attainment of excellence in those areas through some long-term project that would be completed by the end of high school. The project is designed according to parameters set by the school, guided by district, state, or other non-subject related outcomes as determined by the school or district (e.g., Utah Life Skills, district life-role outcomes/results, SCANS skills). Students design their projects such that, between the two projects, they are able to demonstrate a high level of ability in each of the skill/life-role areas.

By the end of the sophomore year, the student completes a proposal for each of the two projects, including details of what each project will accomplish or show and how, together, they will demonstrate the student's competence in the skill/life-role areas. Proposals are approved by a committee of teachers with expertise in the project areas, with the student's

advisor (or other designated faculty member) acting as chair. (NOTE: schools may choose to include parents and/or other community members on the committee. However, participation on a project committee may require a considerable commitment of time for training in rating performance on the project and participating in an oral evaluation.)

From the sophomore year to the beginning of the senior year, students have time to solidify their plans for the project and take courses or do research that will provide them with the background to complete their plans. Advisors should guide students throughout this period in making decisions about which courses to take and how they might further their expertise in their areas of interest. At the beginning of the senior year, student and advisor finalize plans for the projects, set dates for their completion, and identify some end product of the projects appropriate to be included in the High School Exit Portfolio. Final plans for the project should be submitted to the student's committee during the first grading period of the senior year in time for the committee to study the proposals and return feedback by the end of the grading period. *Proposals must be finalized by the end of the first grading period of the senior year.* Once the proposals have been approved, students work to complete the projects within the specified time period and in time for graduation from high school.

SCORING THE PORTFOLIO

Scoring of portfolios is labor intensive and resource consuming. It will be up to schools and districts to determine exactly how they will configure the scoring of the exit portfolio. These decision-making processes relative to scoring must be carried out systematically and carefully. Decisions that affect the graduation status of high school seniors must be well founded and thoroughly justifiable. Decision makers need to take into consideration the impact of their decisions on students, as well as the ability of faculty/scorers to carry out the process they have designed. Districts may choose to take a conservative position on the impact of portfolios initially (e.g., completion of the portfolio fulfills the requirement) and move to a more rigorous scoring process later when both faculty and students are more experienced and comfortable with the process.

The following are some things that need to be taken into consideration when designing the scoring procedure:

- **Type of Scoring.** Portfolios of this type can be scored in a number of different ways. For instance, schools may design the portfolio so that if the project(s) is completed as outlined in the portfolio, and if all components of the other sections are present, the student will automatically pass. In this case, the majority of the evaluation of the portfolio is done prior to its completion.

Other scoring options would involve evaluation of the quality of the materials in the portfolio when it is completed and turned in. In this case, criteria for evaluation and a rubric for scoring must be developed, as well as a basis for assigning ratings of some sort (e.g., superior, excellent, good, fair; A, B, C, D).

Finally, decisions must be made about how the score information will be used, or what a score means. For instance, will the completion of the portfolio affect the graduation status of the student? Does a cut-off score need to be established? If so, what are the criteria for establishing the cut-off? Will varying levels of performance indicate that students graduate with different types of diplomas?

- **Reliability of Scores.** Regardless of whether evaluative decisions are made before or after the completion of the portfolio, scores given to portfolios must be shown to be reliable.

If the portfolio is to be judged on the basis of satisfactory completion, all members of the committee must agree, before the portfolio is completed, upon what constitutes satisfactory completion. When it is completed, all members must agree on whether the criteria have been reached.

If portfolios are to be rated after completion, a detailed scoring guide must be developed beforehand that establishes the criteria for the ratings and indicates what level(s) of performance will be given which rating(s). Rating of the portfolios must then be done by *at least two* trained scorers. This allows for statistical verification of the reliability of the score (i.e. to what extent would the same score be given each time the portfolio is scored).

- **Training of Scorers.** Those who will score the portfolio must participate in sufficient training to demonstrate that they can score the portfolios reliably relative to their fellow scorers.

SUGGESTIONS FOR DESIGNING THE SYSTEM

The model for student educational and occupational planning recommended in this document is multi-faceted and crosses school lines, requiring district level support. In addition, a project of this magnitude cannot be put into place quickly. Schools/districts that wish to implement this model should set aside the *first full year* of the project for planning. Then, depending on the number of elements of the model that are already in place in the school, implementation should be carried out gradually over a period of several years. Ideally, administrators at the district and school levels as well as counselors and key teachers (specifically those on the planning committee) will remain in their positions throughout the entire planning and implementation period. Below are some things to consider during both the planning and implementation phases of the project.

DEVELOPMENT/IMPLEMENTATION OF THE SYSTEM

- Careful consideration should be given to who will serve on the planning committee for this project. One individual at the district level--preferably one whose job includes administrative responsibility for the SEP/SEOP/counseling/ career guidance components of the education system--should lead the committee. Committee members should be representative of all levels of school personnel, but committee membership should be limited to a manageable number--probably 10 or fewer. Consideration should also be given to designating representatives for students and parents to provide input at appropriate points in the planning process.
- Planners should start very early in the planning stages to seek continuous input and commitment from all teachers and other school staff, as well as parents, students, and the community in the planning and implementation of the system. This commitment is necessary, even though most of the planning/decision making will be done at the district level and at the school level by the planning committee.
- One of the first activities of the planning committee should be to develop a set of guiding principles to serve as a basis for the development of the project. These principles should reflect the values of the constituents in the district and the intent of the program. (See Appendix D for some sample "Guiding Principles.")
- For a project like this to be successful, it cannot be dependent on supplementary funding sources. Planners should do a complete review of district funds and determine how the project will impact the district budget. Adjustments in allocation of funds may need to be considered in order to carry out some elements of the plan. Where possible, planners should also explore additional funding sources that may be accessed on a permanent basis to provide the needed resources to implement the plan.
- Districts/schools cannot simply adopt another school's/district's program. Teachers, administrators, parents, and students need ownership in the program. However, it is not necessary to ignore what others have done and start from scratch. The development committee(s) should gather as much information as possible about

what others have done. Particularly, they should take advantage of the experiences of other schools/districts in the state to learn what has and has not worked for them, what parts of their program work well, and what things to avoid.

- The design of the process should include means for systematic evaluation and improvement as it is implemented. Specific expected outcomes should be attached to every element of the plan with a means of assessing their attainment.
- The planning process should consider the impact of the system on the entire district/school. For instance planners should specifically identify adjustments to the school schedule and curriculum that need to be made in order to implement the plan (e.g., ensuring that students' interests have been taken into consideration when determining what courses will be taught and assessed). When the system is fully implemented, it will potentially impact all aspects of the operation of the school. Therefore teachers, students, parents, and community members need to be involved at every step along the way.
- Teachers should be involved in all decisions regarding curricular impact of the project, and possibly be allowed to transfer if they are not willing to adjust to projected changes. Full implementation of the model may result in the addition or deletion of courses, significant adjustment of schedules, and/or imposition of guidance curriculum into some classes. Teachers may need to reconsider the content and/or instruction approach they take in the courses they currently teach. In addition, they may be called upon to teach new courses in addition to or in place of their current load.
- The system should be designed such that teachers can choose whether to be advisors, and what will be their advisory areas; students can choose advisors (with appropriate guidance and limits); and registration and advisement are coordinated so that teachers and student have sufficient time for the advisement process.

COORDINATION

Coordination in this project refers to a coordinated program *from the perspective of the student*. The program should be set up so that *students and their parents* clearly understand the connections between the elementary, junior high/middle school, and high school components of the program.

- The Guidance Curriculum should be split appropriately and coordinated among grade levels. That is, some things should be incorporated into instruction in elementary school to prepare students for junior high, junior high coursework should lead to what is planned for senior high, and so on.
- Multi-school or districtwide implementation is critical so that the program has continuity and can be coordinated at all levels.

- Adequate documentation and teacher interaction should be built into the process as needed to provide continuity in coursework and advisement for students.
- Planning for the project should include time and resources for extensive training of school personnel in the purposes and implementation of the project. All school personnel should be familiar with the entire program so that they can support the efforts being made to help students and parents understand the relevance of every aspect of the system in their teaching and other interaction.

APPENDIX A

KNOWLTON ELEMENTARY SCHOOL

Design

Knowlton Elementary's SEP/Portfolio system, although not yet a full assessment program, is designed to help students begin the goal-setting and prioritizing processes. It is important for students to receive preparation in the philosophical and academic uses of these processes at an early age. Students learn about the goal-setting process by being allowed to set their own goals without restriction from parents and teachers with regard to their relevance. (For instance, one first grade student set a goal to whisper on the bus rather than talk out loud or shout). This approach is based on the idea that self-evaluation and goal-setting must begin as a nonthreatening, experiential process rather than a rigorous, fact-based activity. This approach also instills a sense of responsibility in students; they begin to assume responsibility for all aspects of their schooling. The SEP/Portfolio is *not* used for problem situations; it is a standardized procedure, not a crisis management tool.

The SEP is not used for assessment purposes in that students are not assessed on their completion of goals. Knowlton Elementary has attempted to eliminate summative assessments of any form (i.e., grades); however, parents and teachers requested that grades be maintained. The lower grade report cards (1-3) used at Knowlton de-emphasize summative grades by listing the several abilities that students should gain in each subject area and recording if the student, "Demonstrates an Understanding of Concept" or "Needs More Time and Practice." This gives assessment more of a formative slant and helps students feel more confident about their performance. Also, the grades are never sent home; instead, parents and students meet jointly with the teacher in "student conferences" where the grades are presented and discussed.

The student conferences are held three times a year during the final week of each trimester, and the entire family is invited to attend. Parents call and set their appointments or the school calls them. Parent attendance at these conferences is nearly 100 percent. In the conference, focus is on "celebrating" the student by beginning with recognition of "areas of exceptional performance." This provides teachers and parents an opportunity to give explicit and personal positive feedback to students. This is extremely important, since many students seldom hear positive feedback from their teachers in a personal and direct form.

In the conference, the teacher emphasizes that the student's goals take precedence over parent's goals; the parents only set "goals of support." Teachers, parents, and students review past goals and progress toward attainment of them, and students and parents are encouraged to review existing goals and set new goals if needed. The SEP sheet is also kept in a student folder that teachers frequently refer to in their classes to help students keep track of their progress. The formal SEP file contains the history of goals as well as evidences of exceptional performance and a cassette of the student reading aloud.

Implementation

The SEP advisor instructs teachers how to use the SEP. Teachers are expected to provide positive feedback to all students. Students learn about the SEP process through the student conferences. They gradually become more familiar with the process, becoming more confident in talking about themselves and taking more responsibility for resolving problems.

At the end of each trimester, the SEP goal sheet and grade sheet are reviewed systematically in the student conference. Teachers also frequently refer to the sheets and use them as part of classroom learning activities.

Impact

Students have assumed more responsibility for resolving problems at the school; they recognize that they can change things. Students have also become more confident in discussing their interests and abilities. Students who used the SEP at Knowlton Elementary School have demonstrated a better ability to interpret interest inventory results and test scores; they also knew what questions to ask counselors.

Teachers have willingly assumed the responsibility of finding positive things to say about every child. The student conferences have also become training for parents in dealing with their children's school performance.

MUELLER PARK JUNIOR HIGH SCHOOL

Design

Mueller Park uses comprehensive counseling in their SEOP/portfolio process. Every student (Grades 6-9) meets personally with the counselor and a parent(s) for an annual SEOP conference (20-30 minutes). Through the conference and guidance curriculum taught by the counselor in "common classes," students engage in self-awareness, review of educational competencies, personal development, and career exploration and planning. Students become familiar with testing feedback (SDS, Secondary Challenge, SAT, CPP), goal setting, and long-range planning. Through these activities, students create products compiled in a portfolio kept by the counselor. In the SEOP conference, the student, counselor and parent(s) use this information to review student progress--students are held accountable for previous goals. In the portfolio, students register a secondary education plan, document tentative career interests and relevant classes to be taken, cite educational goals, and review high school graduation requirements.

Although the portfolio does not impact grades, it includes several assessments used for course selection procedures. For instance, Mueller Park uses Secondary Challenge to identify candidates for advanced math and English classes. Students learn about these assessments and how they affect selection procedures. The portfolio includes feedback reports from the SAT, CPP, and SDS.

The portfolio is designed to help students internalize personal growth and career planning processes. The SEOP process links student activities to employment opportunities when appropriate (e.g., students have been able to create personalized programs for academic credit that involve their work experiences). Also, through relationships with local businesses, a job shadowing program has been instituted as a reward for meeting SEOP goals. Students have access to their portfolio during the annual SEOP conference and during the counseling components taught in common classes.

All interest inventory and achievement test results are kept in the portfolio and used for creating educational plans and making tentative career decisions. In the sixth grade, the junior high counselor conducts a "true colors" activity. Mueller Park uses several tools to identify student abilities, interests, and needs: Secondary Challenge, SDS, Choices Jr., and the CPP. These tools progressively introduce students to career categories and personal qualities that will become more important in their planning processes in high school.

Mueller Park built their system on "comprehensive counseling" concepts and used SCANS materials to develop worksheets. After initially developing the system, they conferred with the principal at one feeder elementary school and coordinated their systems. The systems employ concepts of celebrating students individually and prompting students to set goals for personal improvement. The system promotes student-centered learning by providing students with an array of information relevant to personal development and planning.

Implementation

Students receive class-wide instruction in goal setting in the sixth grade. They learn about personality types and become acquainted with their counselor. In the 20 minute sixth grade SEOP conference, students learn the results from Secondary Challenge and are introduced to course selection options.

Counselors use the portfolios extensively. Secondary Challenge data is used for selection procedures and student worksheets are used to facilitate more personal SEOP conferences. Other faculty members were informed about the SEOP/portfolio through a faculty meeting. A steering committee of faculty members helps implement and review different aspects of the system, and conducts a formal review of all SEOP/portfolio processes and materials.

Impact

Selection procedures for advanced classes, course selection, and course offerings have become more responsive to student interests. The SEOP process has motivated students to seek higher levels of achievement. Ninth grade science enrollment has increased from seven sections to nine, math enrollment has grown, and a trigonometry course has been added at the junior high. Students have shown a desire and ability to plan. The SEOP conferences initially resulted in parent gripe sessions; however, students have come to dominate the conferences while parents and counselors listen.

Parents have responded very favorably to personalized conferences (97% of parents attend), becoming the most vocal advocates of comprehensive counseling. Mueller Park has also solicited business cooperation in the SEOP process by informing major employers about the SEOP and requesting that parents be allowed to leave work for SEOP conferences. Businesses have reviewed SEOP documents and provided input about the outcomes addressed.

Improvements

An effective SEOP system must be personal with consistent follow-up; it must be flexible for students, parents, and faculty. It should promote awareness and exploration by introducing students and parents to personal development data. The system will not pigeon-hole students through specific job exploration activities, but it will enable them to effectively pursue such activities when appropriate. An effective system will bring parents, counselors, and teachers together in guiding students through educational processes. Mueller Park has been frustrated by an inability to coordinate curriculum development with the SEOP/portfolio system. Teachers should use the information compiled on individual students' needs, abilities, and interests.

BRIGHTON HIGH SCHOOL

Design

Students at Brighton create long-term educational goals in the careers course. This course, designed by Jordan District, is offered opposite driver's education and lasts ten weeks--sophomores and juniors enroll in the course which is taken by 99% of the students. Through the course, students develop an SEOP based on the district-designed format. The SEOP compiles results from various activities performed in the course (e.g., aptitudes, interests, temperaments, skills and abilities, work history, goals, and a four-year plan). This process leads students through self-analysis and goal-setting activities which are vital to personal development.

In the careers course, students create resumes, cover letters, and thank you letters. They also practice interviewing skills and complete job applications. Students must complete all of the activities required in the careers course to receive credit. Products from the course activities are compiled in a portfolio that is returned to seniors through their English class. The portfolio contains results from the CPP and materials used to identify learning styles, self-esteem levels, work values, temperament, etc.

During the junior year, Brighton also conducts a shadowing program in conjunction with BICEP, a business and industry commission. Students spend a day on the job with a professional in a career of interest to them; they perform this activity three or four times as juniors. Seniors also spend one day formally working on resumes and college applications in the career center.

The careers course scope and sequence document specifies desired student outcomes from participation in the course (e.g., students will be responsible career planners, aware of how to make decisions, clarify their self-concept, etc.). The careers course curriculum, written by Vicky Bork, builds on theories outlined in career education literature.

The district program is designed specifically to promote self-awareness and motivate students to match educational and occupational goals to their well-defined aptitudes, interests, temperaments, etc. Brighton has made specific efforts to enhance the career exploration aspects of the system: they have expanded their career center to accommodate an entire class; and they have improved their shadowing program. These activities help students become more aware of what different careers require, motivating them to plan the acquisition of relevant skills.

Implementation

Students are explicitly prepared to complete the SEOP process through the careers course. One teacher handles all of the careers courses; he is well-prepared and enthusiastic about this assignment. Counselors also participate in the course. The portfolios are kept in the Career Center and returned to students during the senior year. A copy of the SEOP is also retained in a student folder in the career center.

Impact

Students have become more aware of resources in the career center, have learned to rely on themselves more, and have gained valuable experience through the shadowing program.

Improvements

Brighton believes that an effective system will promote self-awareness in students and expose them to career options and requirements through research and experience. These processes must be continued throughout high school by involving juniors and seniors in more exploration activities. A good system must provide continuity by assessing student progress toward their personal goals. Also, a successful careers course requires a teacher that is interested and educated in the appropriate curriculum (as has been the case both years that the course has been offered); no more than two teachers should conduct the class at any school.

Brighton wants to expand the time that juniors and seniors spend in the career center; this will require managing student time more effectively since teachers resent having students pulled from their classes. Brighton also hopes to expand the usefulness of their portfolio. The portfolio appears to be the area where Brighton desires the most assistance, since the careers course and SEOP process are managed through the district.

DIXIE HIGH SCHOOL

Design

Dixie uses an academy approach with five academies corresponding to CPP interest areas. Students choose an academy and designate it on a card provided by counselors. The open-entry/open-exit academies assist counselors and students in registration and scheduling.

Dixie's electronic SEOP process, designed by Washington District and influenced by Uintah's software, is based on CPP and CHOICES information. The SEOP *encourages* students to choose a specific job interest and preparation-level within their academy. Based on that choice, the SEOP program generates a generic four year plan of courses that students should take at Dixie High School. Students, guided by an academic advisor, then alter the generic schedule to meet their interests. The program tallies course requirements to verify that the proposed schedule meets the school's graduation requirements.

The SEOP system at Dixie *encourages* students to consider a postsecondary plan by *allowing* them to access information about duties, tasks, work conditions, etc. in certain occupations. It also *encourages* students to consider the amount and type of training needed for job entry. During SEOP conferences in March, students along with their academic advisors update their four-year plan and review other data in the SEOP file (the file includes standardized test results and information taken from ASVAB and CPP). The software package is still under development; students may be able to access and use more information in the near future.

Dixie maintains a separate portfolio system organized around Core competencies (in the English department). A permanent portfolio contains a checklist of competencies and sample works; a working portfolio contains a more specific list of competencies and sample works. *Communication Essentials*, a Core English course taken by all tenth graders, uses a working list of competencies. When students have not demonstrated a competency, in-class "retreading" opportunities are provided; similarly, "enrichment" opportunities are extended to advanced students. If students have not achieved half of the competencies required in the Core course, they must retake the course. If they pass half the competencies, they may move on to another English class while they are "retreading"--taking a night class for \$35.

At the end of each English course, the student and teacher review the student's working portfolio to determine which of the competency items in the permanent portfolio have been demonstrated and which sample works should be placed in the permanent portfolio. The sample works and competencies checklist in the permanent portfolio are not used for official assessment purposes. The permanent portfolio also includes "one pagers"--student summaries of what they learned and the relevance of the learning--for each humanities course taken by the student and a one pager discussing all humanities courses taken. These products are placed in the permanent file. In addition, students may insert any sample works they wish at any time.

Implementation

Counselors introduce the students to the CPP and academies in the ninth grade vocational Core class. Initially, advisors conducted an advisement component as part of the daily curriculum; since then, the advisement component has been reduced to six days per year. Students receive instruction about the SEOP process through their academic advisor who is assigned to them through their academy sponsor. The academy approach for directing student SEOPs is introduced to parents via PTA meetings and neighborhood meetings at parents' homes.

The English portfolios are used in each English course to track demonstrated competencies and compile evidence of accomplishment. Counselors use the electronic SEOP to coordinate students' choices of academies with their CPP, ASVAB and ACT results and to provide general guidance in educational planning to academic advisors and students.

Navigation teams, including teachers, students, parents, college representatives, and administrators, conduct neighborhood meetings on request to address parent and student concerns. Neighborhood meetings have been very successful in allaying fears about integrated curriculum and the academy approach.

Impact

The portfolio system has produced quantifiable results; SAT scores have risen consistently from 50 to 51 to 54. This year, with the students who took the *Communications Essentials* class, the mean SAT score jumped to 60. In thinking skills, the SATs jumped from 57 to 64. The competency approach of the portfolio system has allowed Dixie to use an integrated curriculum where all classes have honors and remediation components built into them. Students can obtain honors credit by making a competency-based contract and fulfilling it.

The academy approach has also allowed Dixie to offer a wider variety of English classes which are more relevant to the career interests of students. The English department has worked directly with the various academies to design curriculum and competency lists based on the needs of students in those academies.

Improvements

For the SEOP electronic files, Dixie identified the need for an interactive program. The generic schedule generated by the computer (based on career choice) needs to be based on the subjects taught at Dixie and students should be able to easily alter the generic schedule to develop a personalized educational plan reflecting their interests.

GRANGER HIGH SCHOOL

Design

Granger facilitates life planning through the SEOP and a Skills for Success class. During the spring, ninth graders are invited to Sophomore Orientation, an informal, introductory process (attendance has increased sharply). Ninth graders register for sophomore classes after the orientation. More meaningful planning occurs in the Skills for Success class, a semester-long requirement for all sophomores. The class introduces students to personal, thinking, and interpersonal skills as well as career options. Towards the end of the class, students learn to use the CHOICES program and begin developing an SEOP and a "five year plan." Students prepare for SEOP development by participating in self-awareness activities, taking the GATB and PLAN, processing feedback from the tests, and exploring what different occupations require and offer. After experimenting with a formal, student-parent SEOP conference during the Skills for Success course, Granger has opted to hold the formal SEOP conference in the eleventh grade, after all students have assimilated the concepts involved in life planning.

Granger piloted the state's "Critical Workplace Skills" program. Although teachers disliked the program, it compelled them to develop their own version. Granger faculty brainstormed and organized a sequential flow of learning objectives that should be addressed in a Skills for Success class. Six teachers volunteered to write portions of the curriculum in a standard and meticulous format.

In the Skills for Success class, students fill out job applications, write resumes, and conduct job interviews. Students use personal data to fill out forms and interact in interviews. For the interviews, many resources are available (e.g., McDonalds, Raging Waters, and want ads may be used to solicit real interviews); however, students frequently interview each other. Students store job applications and resumes in the portfolios.

Implementation

The formal training provided through the Skills for Success course is extensive, teaching students how to interpret test feedback, how to identify their career aspirations, how to communicate their strengths to others, etc. This preparation allows students and parents to conduct a meaningful SEOP conference in the eleventh grade. In the Skills for Success class, counselors interpret CHOICES information and help students decide what to do about it. Counselors, in individual SEOP conferences, review GATB strength areas, occupational goals identified by students, postsecondary school plans, and extracurricular activities. This helps the counselor become familiar with the student and provide some relevant registration guidance.

Impact

The Skills for Success class has helped bring students from the three feeder junior high schools together quickly. Counselors have noted a decrease of vandalism and scheduling changes and an increase of concurrent enrollment since the introduction of the Skills For

Success class. Students have responded very positively to the Skills for Success class (some seniors who were never offered the class take it at night school).

Improvements

The counselors mentioned that Skills for Success courses typically succeed when faculties review established curriculum and alter it to meet their own standards. An effective system is one that is developed on-site. Counselors identified two problems with their system: too many teachers teach the course--the best Skills for Success teachers should teach more classes; and counselors have struggled to institute a meaningful SEOP conference in conjunction with the Skills for Success class. This is a problem in all schools (how and when to find the time to adequately prepare students to participate in an SEOP conference).

MURRAY HIGH SCHOOL

Design

Murray's SEOP process utilizes the CHOICES interest inventory, PLAN, Colors Personality, and SDS (Holland codes) to generate career choices for students. Students then use CHOICES to recall a generic four-year high school plan related to their career choice. The PTA schedules SEOP meetings for each student, their parents, and a counselor at the completion of the careers class. The student selects two occupational choices and creates a paper/pencil four-year plan based on those occupational choices. Using a computer program, the student can access information about occupations and postsecondary educational institutions that match their interests. Students input the criteria and the computer generates possible choices. The counselors meet with three to four sophomore students and parents in each SEOP conference, whereas seniors are met with individually.

The *Get a Life* portfolio, developed by the American School Counselor Association (ASCA) under a grant from the National Occupational Information Coordinating Committee (NOICC), encourages teachers to record information about students' successes in their classes. In addition, the portfolio is highly individualized, allowing students to assess themselves. Students use general and specific competency lists to identify their personal strengths and weaknesses. These competency lists (from NOICC Standards, SCANS, etc.) are designed to help students link their school activities to the development of competencies which are relevant to personal long-term planning.

The portfolio contains a worksheet that guides students through a process of identifying personal skills/qualities and making relevant career development plans. Checklists of items needed to secure employment (e.g., a resume, interview practice) as well as for documenting pre-employment experiences, work experience, and relevant student accomplishments are included. In conjunction with this, the computer program used at Murray can print up pre-formatted letters for students to send to colleges and/or employers.

Students have access to their electronic SEOP files and occupational and educational information. They also have exclusive access to the paper portfolios; they can work on them or update them at any time. In their portfolios, students may include representative work which can be referenced to specific competency checklists.

No interest inventory output or achievement test scores are systematically stored in the portfolios, although students may include such output as evidence of abilities if they choose to. At the high school level Murray uses PLAN, CHOICES, and ASVAB to provide more specific career guidance to their students.

Implementation

Students are introduced to the system in the sixth grade; the portfolio is an integral part of their curriculum. Hillcrest Junior High builds on the sixth grade portfolio in their seventh

grade TLC course. In eighth grade, the portfolio is officially reintroduced to students in a Core class.

At Murray High School, students are again systematically led through the portfolio in a careers course which is taught opposite drivers' education. The careers curriculum for the careers course (currently being rewritten) leads students through various planning activities identified in the portfolio. The counselors train careers course teachers in the use of the portfolio, the SEOP process, and CHOICES. Another important component of the high school program is an extensive career day that students participate in designing and preparing. Counselors and teachers also work together with a community council composed of local business persons. This council provides input to the entire career planning process, helps with the job fair, and provides a media business career orientation program. As an example, business involvement has expanded to include the technical writing class and accounting/computer class which do actual work for companies associated with Utah Information Technology Association (UITA). The companies assist with writing class curriculum and job shadowing, come into the classroom with actual problems the business wants solved, and other activities. Each Wednesday during a 90 minute period, students arrange for career speakers/presenters--advertise, introduce, set up the room. Presenters have offered "how to" careers in music, politics, dentistry, software, accounting, animal care, cosmetology, medical technology, car repair, etc.

Impact

The counselors noted that the portfolio and computer program have helped students make more informed choices about their futures. Counselors also noted that since graduation requirements have been relaxed in the subjects of art and social sciences, more students have registered for upper-level math and science courses; this may be a result of more relevant educational planning stemming from the SEOP process.

NORTH SEVIER HIGH SCHOOL

Design

North Sevier uses an elaborate portfolio system to coordinate their graduation process. The portfolio contains several components related to career planning and personal development. Implementation of these components is carried out through advisory groups which meet for 15 minutes each day. Students select an advisor (preferably someone they already know) and an advisory group which stays together throughout high school.

Planning around career interests occurs in the advisory group which utilizes career exploration activities rather than aptitude or interest tests. Each student creates an initial Post-High School Plan and an Educational Plan in the ninth grade. These plans, as well as the annual revisions, are made with parental and advisory assistance. Planning forms, designed as questionnaires, force students to answer questions about career interests, job opportunities, high school registration, participation in extra-curricular and community activities, etc. These plans are reviewed by the advisor; and, in the junior year, they are also reviewed by a student-selected graduation committee (composed of the advisor, a parent, a non-relative adult, and a sophomore student).

The portfolio drives North Sevier's competency-based graduation system. Students collect documents for each portfolio component (e.g., planning sheets, samples of written work, summaries of work and volunteer experiences, certificates, test scores, etc.). Students must complete their portfolio and have it approved by their graduation committee in order to graduate. The portfolios are reviewed based on demonstration of competency. In some cases, a competency may be demonstrated by successful completion of a course (e.g., math specialty courses, Technology class). Portfolios do not include assessments of academic performance in the classroom.

North Sevier's outcomes system, adopted from a Johnson City, New York model, is "belief-driven" meaning that structure is less important than overarching goals. The system focuses on personal qualities and life preparedness rather than academic achievements. Mathematics and Science and Technology are the only traditional academic outcomes addressed in the portfolio. These outcomes can be demonstrated by writing subject-relevant papers, passing basic skills tests (designed by the math department), and/or completing courses. Other portfolio components motivate students to prepare for "productive living" via self-esteem, community service, healthy lifestyles, etc.

The portfolios may assist students in finding employment since they include documentation of student projects, letters of recommendation, resumes, references, volunteer experience, etc. Also, two components of the portfolio require students to form career-oriented relationships with members of the community. Students choose a community member to serve on their graduation committee and they work with a "facilitator" on a community learning experience. These activities help students form working relationships with people in the business world.

Implementation

The system is designed to spread the responsibility and decision-making powers through everyone in the school. All teachers--called "Associates" to indicate shared responsibility--have formal contact with all students each year. This level of teacher contact, as well as greater community involvement and integration of learning (both inside and outside of school), occurs through the "Core" class. In Core, students learn about themes (e.g., consumerism, civilizations) in interdisciplinary, team-taught modules which rotate every six weeks. Change efforts have attempted to achieve greater sharing of responsibility and interactive learning. Students receive instruction about the portfolio-centered graduation requirements through advisory groups.

Impact

Portfolios have motivated students to produce their *best* work; and, since they are a graduation requirement, students feel like graduation has become a more meaningful achievement. North Sevier has experienced a rise overall in SAT scores over the past five years.

Some parents have expressed concern about the abrupt shift in graduation expectations. The principal frequently invites parents to lunch at the school and meets regularly with community members to listen to their concerns and to inform them of the purposes of the program.

ROY HIGH SCHOOL

Design

Long-term planning, career planning, credit evaluation, planning for registration, and portfolio creation occur in Roy's Academic Advisor class. This class is held once a week at the end of the day or after second hour. Teachers, as advisors, select a grade level that they want to advise and students select their own advisor. Teachers advise students interested in their subject area and at the grade level where they do most of their teaching; students choose their own advisor, and are encouraged to choose a teacher they already know. Long-term planning focuses on student preparation for postsecondary experiences. In the class, students receive information about postsecondary options and learn how to obtain more information about admissions, financial aid, and other issues related to postsecondary education.

The portfolio is a by-product of the Academic Advisor class and includes, among other things, an autobiography and essay on ethics. If students complete all of the portfolio-related activities in the class, they receive an academic credit. Students work on the activities each week. Although students may update items in the portfolio, their primary responsibility is to complete the portfolio and to judge its merit.

An oral presentation of student projects is a central activity of the Academic Advisor class. Students are rigorously assessed (by themselves, peers, and teachers) on several well-defined criteria in their oral presentations. In the portfolio, students include a one-page written summary of the project and the evaluation sheet of their oral performance.

Interest inventories are not emphasized at Roy. Students identify their interests by reviewing their accomplishments and actively pursuing leadership and service opportunities. Achievement test scores and grades are also important components of the portfolio. These assessments are intended to help students identify their interests.

Roy's evaluation committee developed their Academic Advisor model and portfolio through review of their own needs and shared information from Uintah, Mountain Crest, and Northridge. The faculty senate functions as a sounding board for student, parent, and teacher input about the class and the portfolio system. Roy attempted to develop a system that gave students consistent contact with an academic advisor to emphasize long-range planning to meet personal educational goals. The portfolio was designed as a way to get students to understand themselves better and to involve parents more in student development.

Implementation

Students receive some instruction about SEOP processes and portfolio design in the Academic Advisor class. Counselors provide input about the class and carry out the SEOP process. Building the portfolio is a continual process in the class; it is not completed until graduation. Students refer to it as they complete assignments in the class. Although, the

portfolio is not used to coordinate learning that occurs in other classes, teachers working with portfolios have become more aware of students' interests.

Impact

The Academic Advisor class has broadened teachers' perspectives on student development, exposing teachers to what students hope to do after graduation. The course has also helped students extend themselves more and develop more skills. For instance, the letters of recommendation requirement has encouraged many students to forge new relationships with adults in the community.

Parents and students have responded favorably to the system. Parents are wary of pushing their children into job clusters or narrow, career-oriented class schedules. Roy has responded to this input by not including interest inventories as components in the Academic Advisor class. In fact, the career center has no involvement with the portfolio system.

Improvements

According to Roy, an effective portfolio system will lead students through a self-analysis and experience-building process. It will broaden their perspectives of what they can do after high school. The system will also increase the scope of teacher-student interactions, allowing instruction to become more attuned to students' interests and goals.

Roy is still experimenting with portfolio design. They want to add a Personal Mission Statement and build more on student accomplishments in junior high school. They also hope to encourage students to improve the quality and conciseness of their portfolios. The academic advisor model has been very successful in bringing teachers and students together under non-traditional circumstances.

SKY VIEW HIGH SCHOOL

Design

Sky View uses a completely electronic SEOP/portfolio system. The portfolio includes educational and career planning components. The educational plan lists educational goals and interest areas as identified on different exams through time (Job-O in ninth grade; PLAN; ASVAB; ACT; etc.). The plan also documents SEOP conferences and four-year high school schedules. The career plan contains career goals as indicated on various tests and scripted responses to questions about career plans. These profiles help students chart their educational course and assist counselors in providing relevant guidance to students.

The portfolio is designed to help students obtain employment. An abstract provides a brief biographical sketch including goals and academic data. A test scores section reveals the history of the student's performance in different subject areas on standardized exams at a glance. The proficiencies page describes activities in which the student has demonstrated specific abilities; this includes an assessment of the student's performance in that area. The activities and achievements section lists all accomplishments of a student (e.g., German club member, leadership conference). A work-related experience section details subject-specific GPAs, work experience, evaluations of work-related attributes (e.g., attendance, punctuality), and descriptions of any certificates or commendations received. Each of these sections is designed to feed automatically into a standardized resume which the student can then tailor for any specific job that interests them. Students have access to computers throughout the campus where they can review information and enter certified changes to their schedules. In the future, students will be able to make independent changes to their schedules.

The portfolio is entirely electronic. The test scores section is based on information from the DAT, PLAN, STANFORD, ASVAB, PSAT/NMSQT, and ACT. The scores are reported under the following subject areas: Language/verbal, mathematics, total academic, science, spelling, study skills. In several sections, the student's educational and career goals are also recorded as they reported them on the aforementioned tests (and the Job-O and SEOP conference interview data). These goals and interests are scripted by the student.

Implementation

A 21-day career planning course is offered to students in the ninth grade. This class, held in November, includes a high school scheduling component. In the spring, counselors meet with the students and their parents in the evening to construct the student's first four-year plan. Students are also introduced to the CPP and CHOICES in the ninth grade class. Counselors use the portfolio information to provide students with more specific guidance about which classes to take. In addition, students review relevant information from their portfolio in an SEOP conference held with their parents and an academic advisor every spring.

Impact

The abstract, transcript of credits, test scores, activities/achievements, and credit evaluation are the only sections of the portfolio currently in use. These sections have helped students to plan their four-year schedules more effectively. The SEOP process and career planning course are also in place.

Improvements

According to Sky View, an effective portfolio system provides students with easy reference tools that give concise information to employers and college entrance committees about students' abilities. An effective system provides varieties of information in a cumulative format to give a brief history of the student's development. A history of test scores, compilations of achievements, and subject matter assessments are documented to allow employers and others to sift through information from multiple assessments quickly.

Sky View is interested in creating linkages with the junior high (North Cache Middle School) and including a ninth grade autobiography document in the portfolio. They would like to track student talents, aptitudes and interests, and provide students with career and educational planning assistance beginning in the seventh grade in order to help students understand the value of the portfolio system and to provide more stimulus for its use in the SEOP process. They are also interested in learning more about how the extensive information provided in their portfolio might guide students' pursuit of education and accomplishments during the high school years.

UINTAH HIGH SCHOOL

Design

Uintah's long-term planning hinges on a computer program similar to, but much broader than, the CHOICES program. The program provides students with career information, high school schedules, and biographical information. The program guides students and their academic advisor--a teacher with training in the program's use--through the SEOP process. The program motivates students to review career information, check graduation requirements, look at Core and achievement test results, and make educational plans. In the SEOP, students choose a job cluster by using an Occupation Finder worksheet. Based on the job cluster, students receive a generic high school schedule which they may revise. This planning system focuses on job clusters and graduation requirements.

Included in the student's SEOP documents (hard copies and electronic files) are demographic information, test score information, and a miscellaneous area. No information has been stored in the test score or miscellaneous areas; however, interest inventory or test score information can be imported from other databases. The database supplies specific information about job requirements, outlook, and working conditions for jobs in the job cluster the student has selected which may help students maintain a career focus after graduation.

Uintah wanted to develop an SEOP system that students could use to learn about a wide variety of careers. They also wanted students to be able to relate their career interests to the courses they registered for in high school. The SEOP program allows for this student-directed coordination between personal interests, job requirements, and graduation requirements. Job cluster information was compiled from state color flip charts, Career Connection, The Job Search People, etc. This information is continually revised and updated.

The portfolio originated in lower-level English classes and has been developed through the media specialist. While students are not assessed on their SEOP performance, certain components of their portfolios are assessed. Portfolio documents completed in English classes impact students' grades. Student products included in the portfolio include an autobiography, an essay on ethics, a reading record or "bibliography," and a sample of creative work.

Implementation

A careers course (one trimester) introduces students to career exploration processes. After the class, which uses a commercial text and familiarizes students with the SEOP program, students have annual "registration" SEOP sessions. In the SEOP conferences, advisors have access to the SEOP files to help them guide students through the process of matching their career interests with their educational plans.

Counselors track students' job cluster choices through the SEOP program, allowing them to identify trends in career interests and alter course offerings accordingly. Uintah plans to respond more to student interests.

Impact

The SEOP program has allowed administration to respond with more foresight to trends in student interests. Also, students have been able to make more informed choices about the classes they want to take at Uintah. The portfolios have stimulated student activity and creativity in the media center, encouraging them to become more familiar with themselves as well as the school's many technological resources.

Improvements

An effective system links job information to the graduation requirements and course offerings of a school. Any SEOP system should guide students through career exploration. An effective portfolio, according to Uintah, compels students to get to know themselves--to reveal their inner feelings about life. It also helps students organize information that will be valuable to them later (i.e., the insurance and funeral planning worksheets). Both processes are under development at Uintah. In the SEOP program, job clusters are continually added and updated.

APPENDIX B

POSSIBLE COMPETENCY DOCUMENTS

1. Utah Life Skills
2. Secretary's Commission on Achieving Necessary Skills (SCANS)
3. Michigan Employability Skills Group
4. National Center for Educational Outcomes

These documents cover different basic competencies. The following matrix shows areas of similarity and difference between the documents.

Competencies	Utah	SCANS	Michigan	NCEO
Manages Resources and Plans • identifies, organizes, plans, and allocates resources	X x	X x	X	
Works Effectively With Others • contributes responsibly • resolves conflicts • responds/adapts • leads • respects cultural differences	X x x x x x	X	X x x x	 x x
Acquires and Uses Information • reads, writes, speaks, listens • performs math and arithmetic • knows how to learn	X x x x	X x x x	 x x	 x x
Works with a variety of technologies	X	X	X	X
Assumes and Displays Responsibility • fulfills responsibilities • manages self (copes) • adapts to changing circumstances • contributes/participates/volunteers	X x x x x	X x x	X x x	X x x x x
Perceives Personal Worth • evaluates self • is aware of healthy lifestyles	X x x		X x	X x
Communicates Productively • listens, speaks, reads, writes	X x	X x	X x	X x
Identifies and Solves Problems • understands systems/relationships • conceptualizes abstract problems • makes decisions • reasons • analyzes thoughtfully • thinks creatively/innovates	X x x x x x x	X x x x x	X x x	X

COMMUNICATION ESSENTIALS
Competency Checklist

Student Name _____ Grade _____ Date _____

Teacher _____ Class _____

Knowledge Retrieval

- ☐ 1. Draw a map of the school Instructional Materials Center (IMC) and pass a test on the IMC resources.
- ☐ 2. Complete the following tasks:
 - a) locate sources
 - b) take notes
 - c) limit topic
 - d) form a workable thesis
 - e) conduct an interview and take notes
 - f) conduct a key word search
- ☐ 3. Complete a research paper to place in personal portfolio, including a simple graph and "work cited" list as part of the paper.

Life Skills Communication

- ☐ 1. Present an oral introduction to the class and a written biography submitted to the teacher.
- ☐ 2. Produce five different mailable letters.
- ☐ 3. Using correct form and content, prepare a resume of educational background and experiences.
- ☐ 4. Record five phone conversations and select the best for play back to class or group.
- ☐ 5. Demonstrate Roberts' Rules of Order by responding appropriately in class when the Rules are being used.

- ☐ 6. Identify an issue and create a correctly outlined and formatted agenda.
- ☐ 7. Demonstrate reading and understanding of news media by composing summaries of articles of the student's choice.

Study Skills

- ☐ 1. Complete a self-image survey.
- ☐ 2. Pass daily oral language exercises.
- ☐ 3. Produce a classroom etiquette plan.
- ☐ 4. Prepare an Organization Skills Portfolio-Time Management Schedule.
- ☐ 5. Pass oral and written tests on listening, reading textbooks, and memory aids.
- ☐ 6. Pass a test on Test Wise (test preparation).

Oral Communication

- ☐ 1. Successfully deliver a brief, impromptu speech on an assigned topic.
- ☐ 2. Participate in panel discussions.
- ☐ 3. Give a persuasive speech using visual aids.

APPENDIX C

SAMPLE STUDENT RESUMES

Student Resume

Kathy Ann Pupil
254 W. Maplethorpe
Cititown, Alabama 42987-0974
(429) 388-9807

Date of Report: June 21, 1992
SSN: 515-21-4338
Date of Birth: March 13, 1974
Age: 18

Academic/Elective Courses	No. of Classes	Page
English	3	3
Mathematics	2	3
Natural Science	1	3
Social Science	1	3
Foreign Language	2	3
Fine Arts	3	4
Vocational Education	1	4

Competencies	Rating	Page
Self Management	4	7
Interpersonal Skills	5	7
Resource Management	4	8
Technology	3	8

Accomplishments	References	Page
Report on Grounds Keeping	Clark Kent	10
Video on Architectural Styles	Jean Jones	11
Newspaper Article	Louis French	11
Volunteer of the Year	John Grove	12

Community Service	Role	Date	Page
Rotary Club	Volunteer	6/91-8/91	13
YWCA	Coach	1/92-4/92	13

Projects	Advisor	Page
Environmental Dangers in the City Park	Ms. Lavinia Page	15
Senior Piano Recital	Mr. Peter O'Toole	18

Address: 244 West 300 North, Hyde Park, UT 84318-0676 **Phone:** (801) 563-2332

Birthdate: 05/23/76

Age: 17 years 5 months

Sex: Female

Grade: 12

Social Security Number: 526-43-5288

Race: Caucasian

Citizenship: United States

Current Status: Graduating Senior, Class of 1994, Anytown High School

General Career Path: Social, Health and Personal Services

Specific Career Goal: International Law or College Professor

Educational Goal: 7-8 years of college (e.g., Doctorate--PhD., MD., JD.)

Institutions of Choice: Weber State University or University of Utah

Approximate GPA: 3.748

ACT Composite: 26

Scholarship Interests: Academics

Portfolio Contents:

Page

*NOTE: This resume is patterned after the abstract that accompanies the Sky View High School Senior Portfolio.

APPENDIX D

SAMPLE GUIDING PRINCIPLES²

The National Consortium of Career Guidance Supervisors recognizes a set of eight principles as a foundation for career planning. These principles can provide the impetus for defining the specific purpose of individual and locally relevant programs:

1. An individual's career is reflective of lifelong planning and work preparation. Career is defined as the totality of work, paid or unpaid, one experiences in a lifetime.
2. Freedom of choice is one of the most cherished rights in a democratic society. Freedom to choose education and work options is expanded by knowledge and constricted by ignorance.
3. Every student has the right and the responsibility to learn career planning skills and to gain the knowledge necessary to make informed choices which can then be tested in a supportive environment.
4. All students deserve career assistance regardless of their program of studies or their educational and career goals.
5. Successful education and career planning is the shared responsibility of schools, students, families, employers, and communities.
6. Career planning is fundamental to the individual delivery of education. It empowers counselors and teachers to stress the relevance and application of coursework to careers.
7. Parental and employer involvement enriches the educational and career-planning efforts in schools.
8. Students who use career-planning skills and plans as guides to select education and work options are more adaptable to the changing labor market, carry advantage into the learning process, and are more productive, employable and satisfied at work.

Discussions of local needs and expectations could be stimulated by using the eight principles. This and/or similar local information should be provided to those defining and reviewing the purpose of the local activities. From this discussion, the foundational beliefs or principles will be developed. These will lead to a collaborative definition of purpose—one that all groups can own and thus promote.

² From *Planning for Life Program Guidebook*, Sponsored and Administered by The U.S. Army Recruiting Command with the support of the National Consortium of State Career Guidance Supervisors, Center on Education and Training for Employment, 1900 Kenny Road, Columbus, OH 43210-1090, March 1994.



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